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**TO:** Directors of Financial Aid  
Public and Private/Independent Institutions of Higher Education

**FROM:** DeChà Reid  
Director, Financial Aid Services

**DATE:** December 1, 2017

**RE:** Financial Aid Database (FAD) Report Portal Open - FY 2018 (2017-18)

Over the past year, Coordinating Board staff has worked extensively with a subcommittee of the Financial Aid Advisory Committee to develop a plan for streamlining and improving reporting of financial aid data. As a result, a new FAD Report and validation/certification web portal were designed to consolidate reporting and allow institutions the ability to electronically sign completed reports online.

Beginning FY 2018, institutions are required to follow a new FAD reporting schedule consisting of three separate reports. The first two reports are intended to validate the reported data and the final report is to certify the data. The additional reporting cycles will incorporate relevant data that was previously submitted on other reports. (e.g. TEG Need Survey and End-of-Year reports).

The first reporting cycle for the FY 2018 FAD Report begins December 1, 2017. Attached is a link to the revised FAD manual for FY 2018. Several webinars will be posted to the Student Financial Aid Programs (SFAP) Information website under the training section in the coming weeks to assist institutions with the transition to the new reporting cycles and process.

Institutions will submit files for processing using the secure data exchange process, [MOVEit DMZ](#). More information on MOVEit DMZ can be found in the [User Guide](#) located on the Student Financial Aid Information website. The deadline dates for each submission are listed below:

Reporting Cycle	First Day to Submit	Deadline	Submission Requirements	Purpose
First Report	December 1, 2017	January 31, 2018	Correct Errors	To collect and verify preliminary data in order to project state aid program resources for allocations and to evaluate current student financial aid needs for legislative reporting.
		February 28, 2018	Validate Data	
Second Report	May 1, 2018	June 27, 2018	Correct Errors	To collect and verify End-of-Year data to reconcile state programs funds and track student eligibility.
		August 1, 2018	Validate Data	
Final Report	August 31, 2018	November 14, 2018	Correct Errors	To collect certified data used for legislative mandated reporting.
		December 12, 2018	Certify Data	

Institutions are required to submit a separate FAD report for each reporting cycle and should allow sufficient time to resolve errors and reconcile data by the specified deadlines. The FAD report must reconcile with the information reported for state financial aid programs and the CBM001 enrollment report. The FAD Report for the first reporting cycle must be validated online through CBPass. Current users will need log in to [CBPass](#) and click **My Access** to request the new "Financial Aid Data Certification" application. First-time users will be required to create a profile for CBPass and then request access to the online validation/certification application.

For questions or concerns, please contact Financial Aid Services at 844-792-2640 or [CONTACT US](#). (Select the "State and Federal Grant and Scholarships" option in the drop-down selection under **Contact Reason**)

**Enclosed:** [FAD Manual FY 2018](#)

cc: Ken Martin, Assistant Commissioner  
Charles Puls, Deputy Assistant Commissioner  
Presidents and Chancellors